

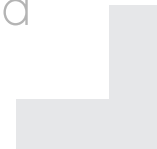


hermes consilium



sleep and stress.

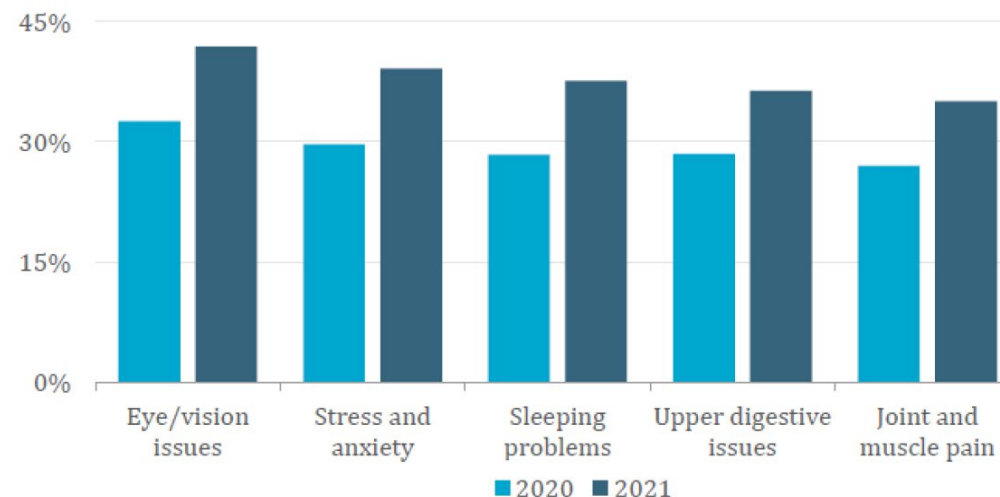
market data on
a rising trend



major health concern

- sleep disorders and stress have been **in the top 3 consumer health concerns** in the past years
- **consumers are not satisfied with the current treatment** for sleep problems – **58,6% of Polish consumers are seeking new treatment solutions for sleep** (Euromonitor survey, 2021)

Current Health Concerns 2020/2021

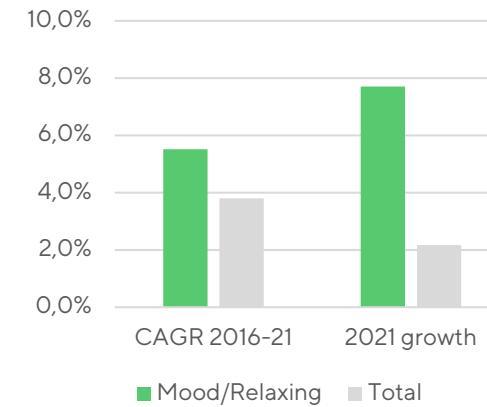


Source: Euromonitor International's Health & Nation Survey, 2020, 2021

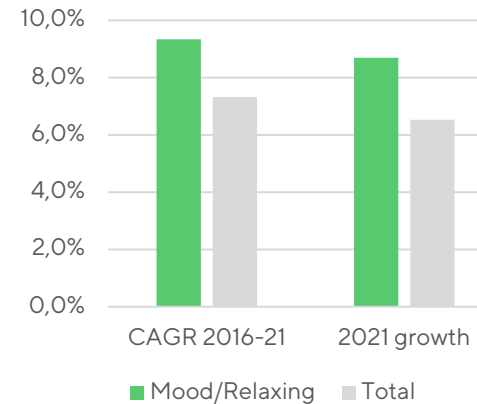
market growth

- **global awareness and demand for mood/relaxing dietary supplements** have risen in the recent years due to the pandemic and economic crisis
 - **Google searches in 2021** increased by 11% for “sleep supplements” and by 7% for “stress supplements”
 - there has been **an increase in online sales** of stress relief (31% y-o-y growth) and sleep support (55% y-o-y growth) supplements on **Amazon.com in 2021**
- **demand for mood/relaxing dietary supplements** has also been growing faster than the total dietary supplement average in the past 5 years **in CEE markets** such as Romania and Poland

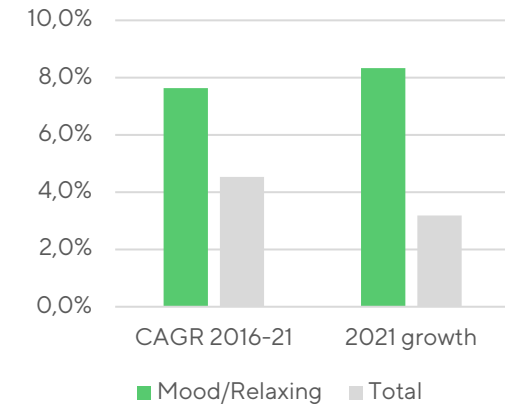
Dietary supplements world



Dietary supplements ROM



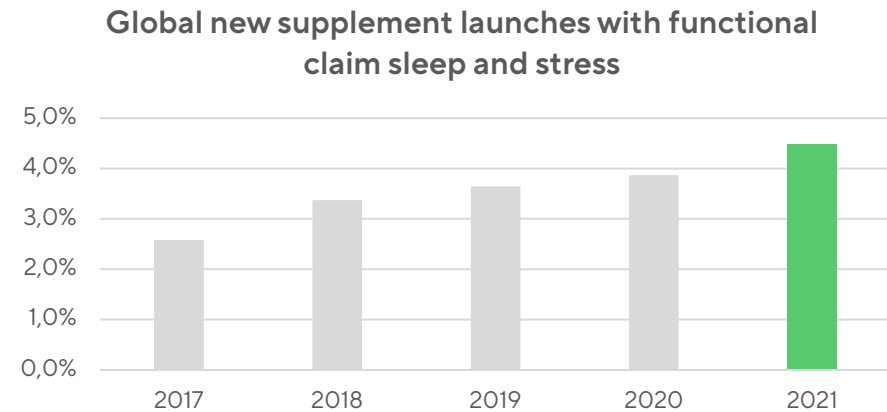
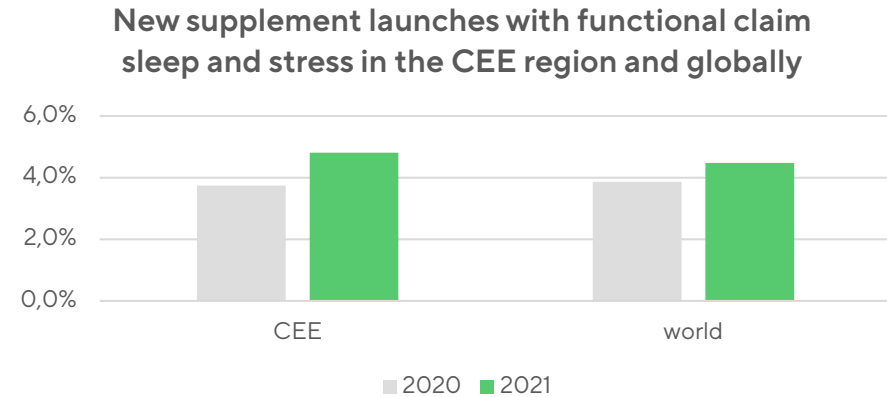
Dietary supplements POL



Source: Euromonitor Consumer Health data, June 2022

product launches

- **sleep and stress functional claims** are present in around 4,5% of global new supplement launches and around 5% of new supplement launches in the CEE region
- **significant growth was seen in the last 5 years** – from 2,6% of all global new supplement launches in 2017 to 4,5% of all launches in 2021
- **significant growth was also seen in the CEE region** – from 3,7% of all new launches in 2020 to around 5% of all new launches in 2021



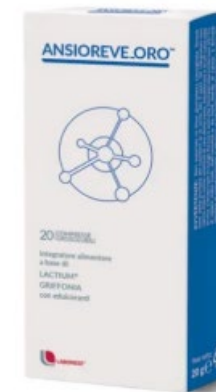
Source: Mintel GNPD, June 2022

launched by leaders

- sleep and stress functional claims are present in new product launches from **some of the world's leading** and most innovative brands
- **the sleep and stress segment** is growing and evolving from commodity-driven to more developed **premium clinically supported segment**
- **global pharma brands** (Pierre Fabre, Uriach, Servier) and **innovators** (Nature Made) **are launching premium products** with branded and clinically studied ingredients
- companies in **the CEE space** (Barny's, Dietpharm) are **following the global trend**



Nature Made USA
Based on Sensoril® and Mg



Uriach (Laborest) ITA
Based on Lactium® and griffonia



Barny's CZE
Based on Lactium®



Dietpharm CRO
Based on Mg, Safr'Inside™, Lactium®, and vitamin B6

Recent global and CEE market trends indicate **sleep and stress** products with **clinically tested branded ingredients** may present a promising market opportunity in the future.





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